

# Salesforce Knowledge Proposal

November 2015

# Agenda

- Knowledge Management
  - Overview & Trends
  - Common Challenges
  - Salesforce Knowledge
- Excelacom Approach
  - Scope
  - Deliverables
  - Business Case
- Summary & Next Steps

Excelacom has over 15 years of Sales Operations & Sales Strategy experience supporting top fortune 100 companies

# <KNOWLEDGE MANAGEMENT>

# Trends in Knowledge

## *Across Channel*



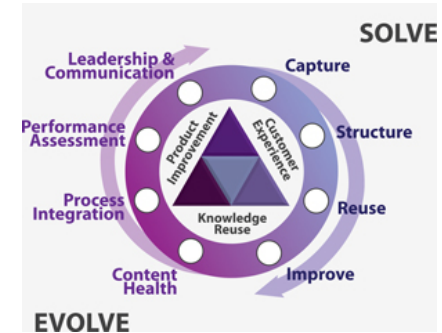
- *Single Source of Knowledge*
- *Serves Agents, Partners and Customers*
- *Seamless Integration to Products*

## *Consume Anywhere*



- *Knowledge at Your Fingertips*
- *Access Wherever You Are*
- *Flexible Display, Rigid Security*

## *Maximize Process (KCS)*



- *Improve Agent & Partner Satisfaction*
- *Improve Case Deflection*
- *Improve First Call Resolution (FCR)*

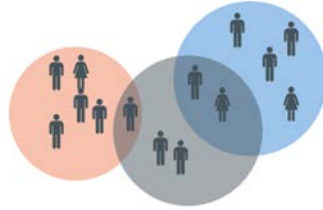
# Common Challenges

## Common challenges companies face when managing content



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*Cumbersome and ineffective processes for agents and partners to submit feedback*



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*Content managed independently for various departments and geographic territories*



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*Tools limitations for authoring and managing content*



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*Unorganized content and structure*

# What is Salesforce Knowledge

Salesforce knowledge base lets you create and manage custom articles that can be easily shared with your users, customers, partners, and website visitors

## Find Relevant Content

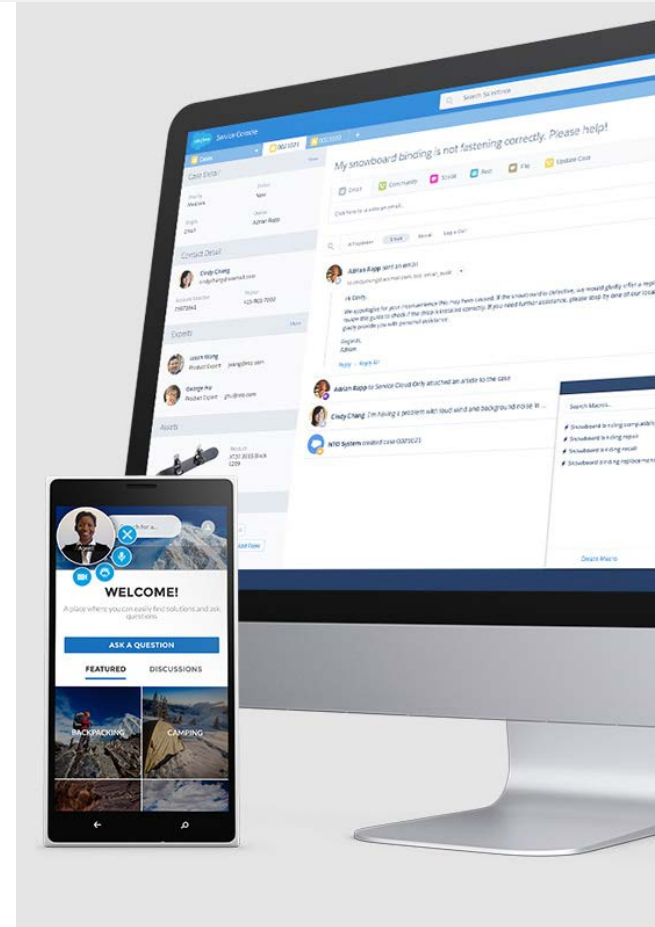
- System Assisted / Recommended
- Self-Help (Search / Filtering)
- Communities

## Empower Customers

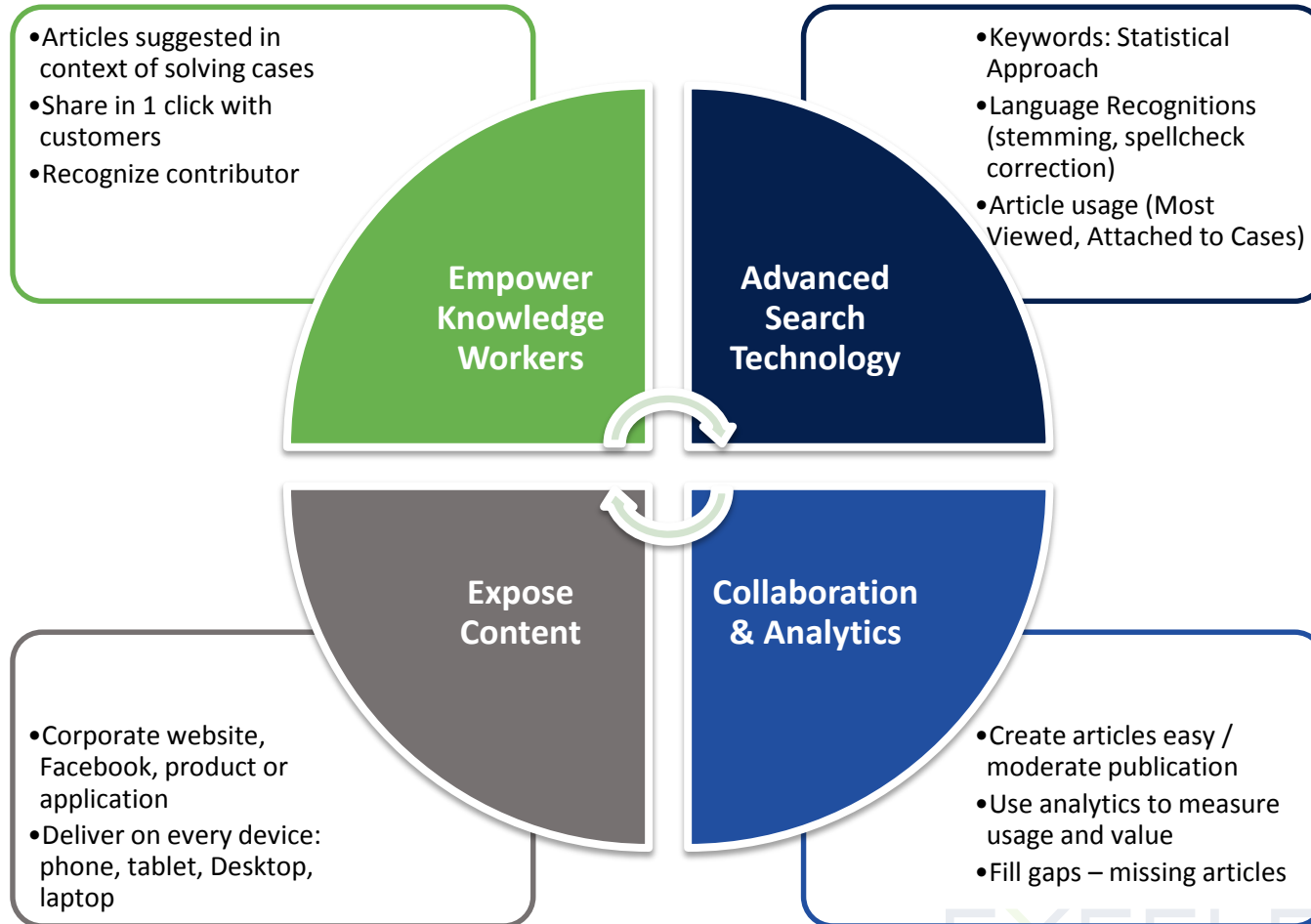
- Expose Articles on any Device
- Fully Integrated into Chatter Answers
- Convert Best Answer into a New Article

## Empower Knowledge Workers

- Push Relevant Articles at Right Time
- Embedded in Case Resolution Process
- Recognize and Award Contributors



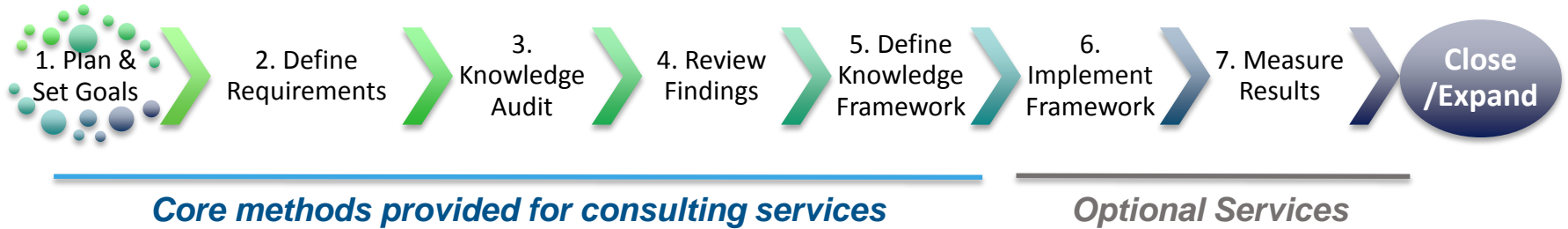
# Salesforce Knowledge Core Capabilities



# {EXCELACOM APPROACH}



# Excelacom's Consulting Methodology



1. Plan and set Project Goals
2. Define As-Is and To-be Business Requirements
3. Conduct Knowledge Audit
4. Review Audit and Requirements Gathering Sessions findings
5. Define Sales Knowledge Framework
6. Project Manage / Actually Implement Framework
7. Measure Results and Optimize
8. Close / expand scope to other areas

# Scope of Work

- Define a Knowledge framework that
  - Is accessible by external Partners who do not have access to Charter internal SharePoint sites
  - Integrates into the salesforce community
  - Supports a powerful and easy to use search function
  - Supports interactive Frequently Asked Questions (FAQ)
  - Is scalable to meet future needs to support knowledge for Customers, and Partners in sales channels for other lines of businesses
- Create Custom Article Fields, 3 Custom Article Type Templates, Categories, Category groups, Custom profiles & Custom Reports for Salesforce Knowledge

# Project Deliverables

- To-Be Knowledge data requirements
- Knowledge Audit Findings
- Knowledge Framework including
  - Definition and Recommendation on 3 Standard Templates and Data Categories
  - Knowledge content creation and publishing flow
  - Utilization tracking analytics
  - Key Productivity Index (KPI) Metrics
- Weekly Project Status Reports
- Recommendations for scalability

# Proposed Resource Profiles

## Senior Strategist

(Part Time)

- Conduct customer architecture assessment
- Design secure, high performance technical solutions
- Communicate technical solutions and design tradeoffs effectively to business stakeholders
- Provide a delivery framework that ensures quality and success

## Knowledge Developer

(1 Full time)

- Identify, organize and provide access to scattered, heterogeneous information in digital and paper form
- Conduct the knowledge audit to determine and continually re-evaluate the specific knowledge needs of users and their business processes.
- Define knowledge processes and identifying the technology requirements for creating, capturing, organizing, accessing and using knowledge assets.
- Customize/Configure fields, Article type, Article templates, Article Layout, Data Categories, Category Groups, Roles & Profiles, approval/publishing workflows.

# Planned Project Timeline

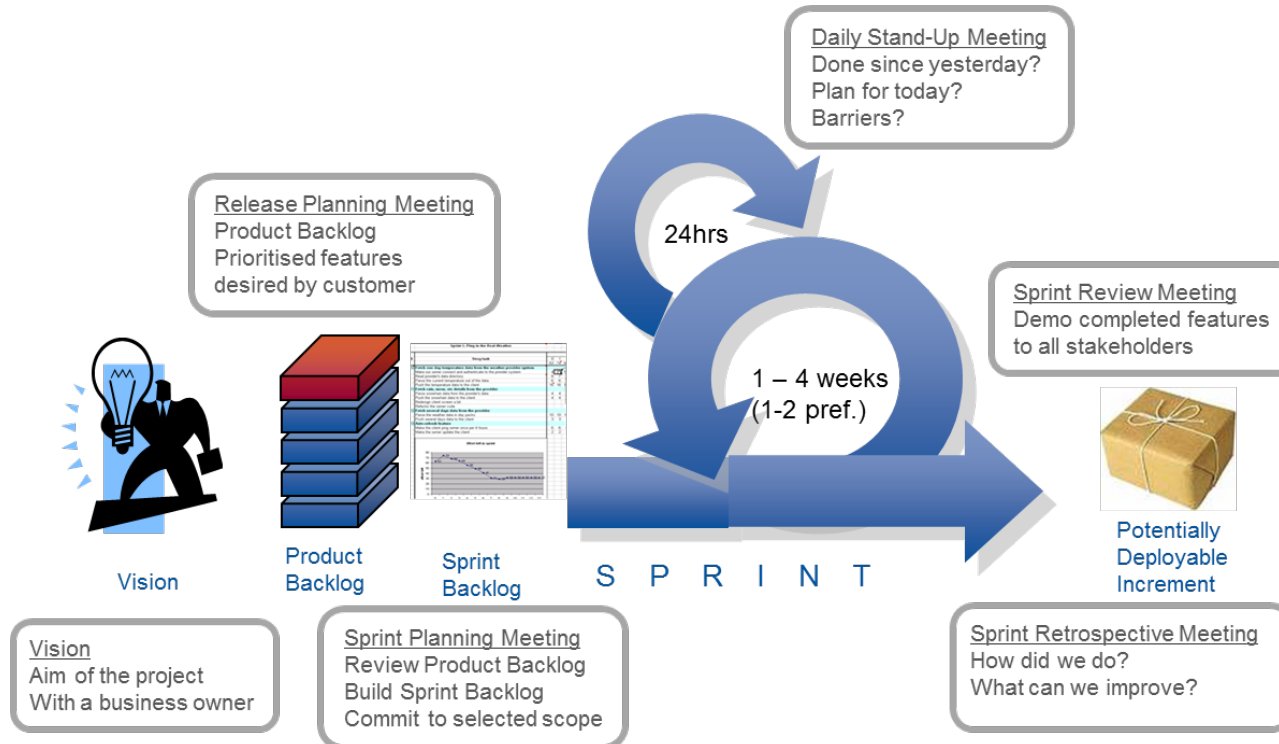
Knowledge Project		Weeks			
Task #	Task Name	1	2	3	4
1	Plan and Set Project Goals				
2	Define As-Is, Conduct RGS Sessions				
3	Plan and Execute Knowledge Audit				
4	Define To-Be Requirements				
5	Define Knowledge Framework				
6	Review, Update Framework, and Close Project				

## Assumptions:

1. All contract, access requirements are completed before project start date
2. Once requirements are finalized, project sizing will confirm if 4 week duration is realistic. Charter Project Sponsor review with Excelacom if Change Request is needed.
3. Charter employees and pilot partners are made available for Requirements Gathering Sessions, and User Acceptance Testing
4. Project Sponsor and key stakeholders are available to provide feedback and review deliverables on time
5. Scope of knowledge framework can be expanded to other channels

# Implementation Plan(Scrum Process)

Excelacom will utilize an Agile delivery methodology to support growing business needs and improve speed to market for enhancements



# Business Case



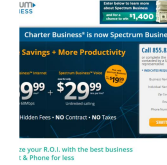
## Investment

- A team of 2 Excelacom Consultants for 4 weeks



## Benefits

- Knowledge is integrated into problem solving
- Demand and usage driven content
- Leverage Partner community and Charter Sales collective experience
- Reward learning, collaboration, sharing and improving Partner experience



## Results

- 60% improvements in resolution time
- 50% increases in first-contact resolution
- 40% improvements in agent satisfaction
- 50% increases in case deflection

# Strategy Services

Excelacom will meet with Charter leadership on a quarterly (or mutually agreed timeline) to review KPIs and strategy for improvements

- **Adoption** – service processes, knowledge base, agent info and content creation is well connected to improve adoption
- **Agility** – Business and Sales operations are quick to embrace necessary changes to leverage market opportunities
- **Multi-Channel and Mobile** – Platform delivers knowledge across cloud based channels such as self-service communities via mobile devices
- **Increase Operations insights** – Analytics on which articles are working well, who is consuming knowledge, identify knowledge gaps and continuously improve



# Summary & Next Steps

- **Extensive Sales Ops support experience.**  
Excelacom can leverage all the knowledge from helping CSOs with their sales operations support.
- **Business Value, Industry best practices.**  
Our extensive Best Practices, Process, Metrics, Tools provide more business ROI
- Excelacom **combines our talent with your internal expertise** to scale Sales Ops support to meet Charter's sales goals
- Incorporate Katie's feedback, and finalize Statement Of Work for finance and legal reviews to begin project by Dec 1, 2015



Reduce Risk

**Improve Partner  
Knowledge**

Increase Efficiency

**Improve Partner  
Experience**



# THANK YOU

## EXCELACOM

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